



## TRAINING GUIDE

### **CLASSROOM Manager Self-Service**

Created on 12/04/2015 11:13:00 AM



# **TRAINING GUIDE**

## **CLASSROOM Manager Self-Service**



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## NOTES

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## **CLASSROOM Manager Manager-Self Service**

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Student Name

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Instructor(s) Name(s)

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Class Date

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Go Live Date

Help Desk 410-260-1114

Online Training Library: <http://mdcourts.gov/connect/connected/>

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## NOTES

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## **CLASSROOM Manager Self-Service**

### **MANAGER SELF-SERVICE - Classroom**

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#### **CONNECT Manager Self-Service**

Manager Self-Service encompasses all the pages where managers will use for request and direct report related transactions. The navigational folder is available through the Main Menu, from which managers/supervisors can access all sections of CONNECT to manage their direct reports.

During this module you will review topics on:

- Introduction to Manager Dashboards
- Time and Absence Approval Process
- Recruitment Processes
- Delegation of Manager Tasks
- Create and Update Performance Documents

### **Introduction to Manager Dashboards**

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#### **Introduction to Manager Dashboard**

Managers have access to two dashboards that will provide them with an overview of pending approvals, quick access to specific tasks, and alerts to due dates or expirations.

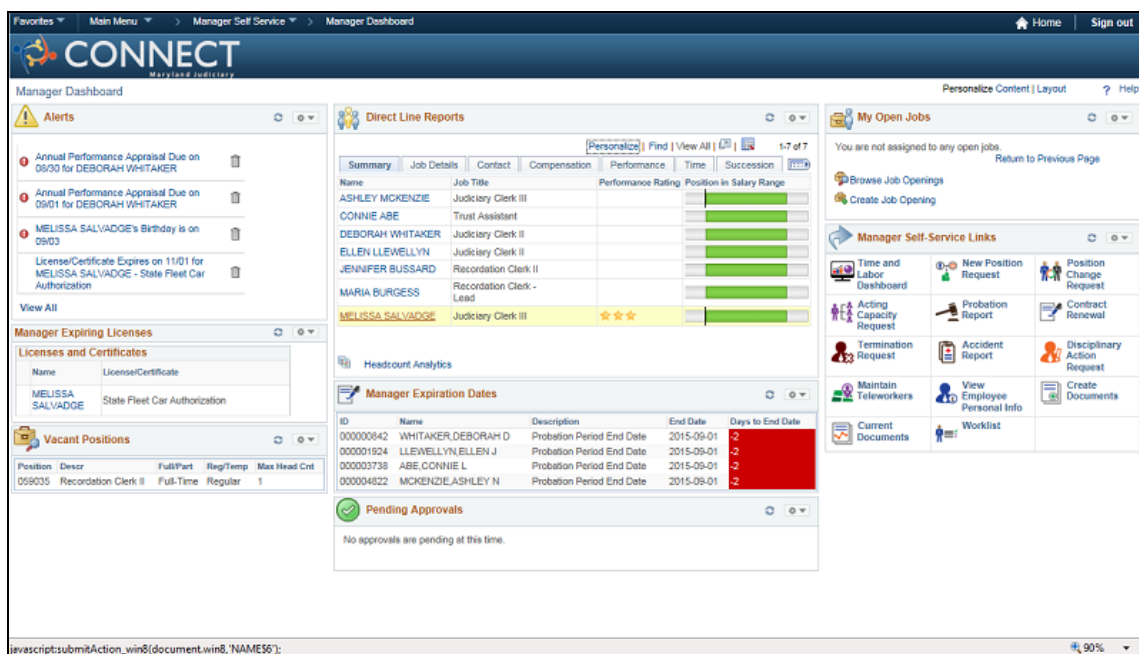
During this module you will review topics on:

- Understanding the Manager Dashboard
- Understanding the Time and Labor Dashboard
- Worklists: A List of All Pending Approvals

## Understanding the Manager Dashboard

The Manager Dashboard provides supervisors a quick view of:

- Alerts
- Expiring Licenses
- Direct Line Reports (summary, job details, contact, compensation, etc.)
- Manager Self-Service Links
- Manager Expiration Dates
- Job Openings (created by the manager)
- Vacant Positions
- Pending Approvals



The screenshot shows the Manager Dashboard interface. The top navigation bar includes 'Favorites', 'Main Menu', 'Manager Self Service', and 'Manager Dashboard'. The dashboard is divided into several sections:




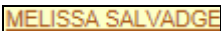
- Alerts:** Lists upcoming events such as 'Annual Performance Appraisal Due on 06/30 for DEBORAH WHITAKER' and 'License/Certificate Expires on 11/01 for MELISSA SALVADGE - State Fleet Car Authorization'.
- Direct Line Reports:** A table showing employee details including Name, Job Title, Performance Rating, and Position in Salary Range. Employees listed include ASHLEY MCKENZIE, CONNIE ABE, DEBORAH WHITAKER, ELLEN LLEWELLYN, JENNIFER BUSSARD, MARIA BURGESS, and MELISSA SALVADGE.
- Manager Expiring Licenses:** A table showing license details for MELISSA SALVADGE, including the license type 'State Fleet Car Authorization'.
- Vacant Positions:** A table showing open positions with details like Position, Desor, Full/Part, Reg/Temp, and Max Head Count.
- Manager Expiration Dates:** A table showing expiration dates for various employees, including WHITAKER, DEBORAH D, LLEWELLYN, ELLEN J, ABE, CONNIE L, and MCKENZIE, ASHLEY N.
- Pending Approvals:** A section indicating 'No approvals are pending at this time.'
- Manager Self-Service Links:** A grid of links for various actions like 'Time and Labor Dashboard', 'New Position Request', 'Position Change Request', 'Acting Capacity Request', 'Probation Report', 'Contract Renewal', 'Termination Request', 'Accident Report', 'Disciplinary Action Request', 'Maintain Teleworkers', 'View Employee Personal Info', 'Create Documents', 'Current Documents', and 'Worklist'.


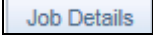

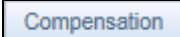
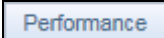
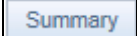
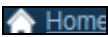

## Procedure

This topic will describe the various pagelets available in the Manager Dashboard.

Step	Action	Notes
1.	Click in the <b>User ID</b> field. <input type="text"/>	
2.	Enter " <b>connie.green</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field. <input type="password"/>	

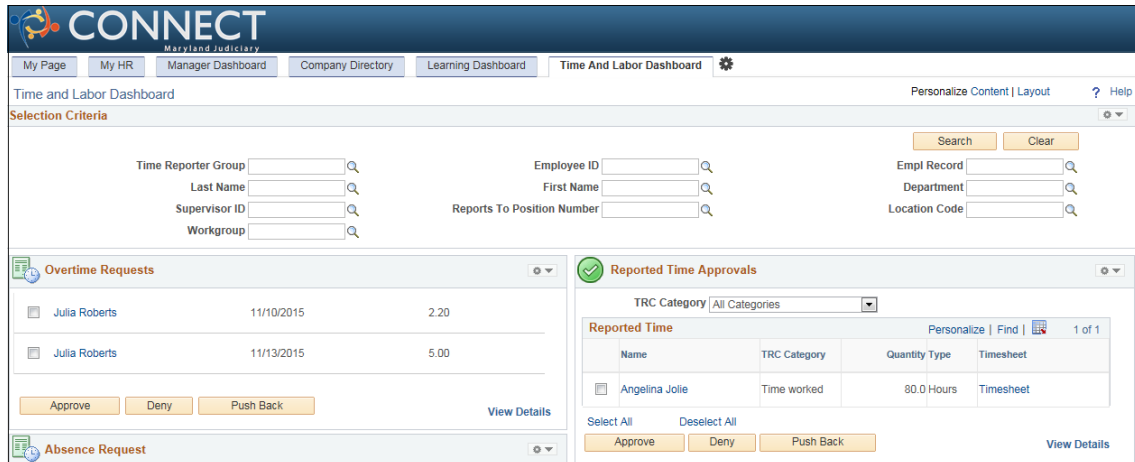


Step	Action	Notes
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Manager Dashboard</b> menu. 	
8.	The manager dashboard is the centralized page to facilitate manager's tasks.	
9.	Alerts display items that require actions based deadlines. It will also alert you on direct reports birthdays and anniversaries.	
10.	The Manager Expiring Licenses pagelet displays all of the direct report's licenses and certificates expiring within 60 days.	
11.	The Vacant Positions pagelet displays direct report current vacant positions.	
12.	The My Open Jobs pagelet displays all the job openings created by the manager.	
13.	The Manager Self-Service Links pagelet provides quick access to the various request forms.	
14.	The Pending Approvals pagelet displays a list of pending approvals required manager's attention.	
15.	The Manager Expiration Dates pagelet will display probationary period end dates, expiring contracts, and acting capacity end dates. The <b>Days to End Date</b> column color codes are: <b>Yellow</b> shows within 15 days of expiration. <b>Red</b> shows within 5 days of expiration.	
16.	The Direct Line Reports pagelet displays all employees' summary information including Job Details, Contact, Compensation, and Performance.	
17.	Click the <b>MELISSA SALVADGE</b> link to access the Talent Summary page. 	
18.	The Talent Summary page provides the job information at the top. The bottom displays a set of pagelets with employee's details of qualification, compensation and performance.	
19.	Click the scrollbar to move down the page.	
20.	Click the scrollbar to move up the page.	

Step	Action	Notes
21.	Click the <b>Return To Manager Dashboard</b> link. 	
22.	Click the <b>Job Details</b> object. 	
23.	Click the <b>Contact</b> object. 	
24.	Click the <b>Compensation</b> object. 	
25.	Click the <b>Performance</b> object. 	
26.	Click the <b>Summary</b> object. 	
27.	Click the <b>Home</b> link. 	
28.	Click the <b>Sign out</b> link. 	
29.	You have completed the review of the Manager Dashboard topic. <b>End of Procedure.</b>	

## Understanding the Time and Labor Dashboard

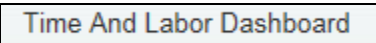
The Time and Labor Dashboard allows Managers to view schedule deviations and act on overtime requests, absence requests, and reported time approvals.



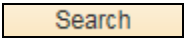
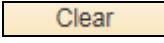

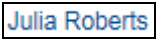


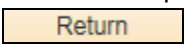




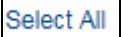
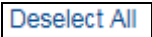
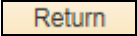


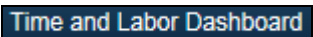
The screenshot shows the CONNECTed Training Library interface. The top navigation bar includes tabs for My Page, My HR, Manager Dashboard, Company Directory, Learning Dashboard, and Time And Labor Dashboard. The Time And Labor Dashboard is selected, showing a Selection Criteria section with search filters for Time Reporter Group, Employee ID, Last Name, First Name, Supervisor ID, Reports To Position Number, Empl Record, Department, and Location Code. Below this, there are three main sections: Overtime Requests, Reported Time Approvals, and Absence Request. The Overtime Requests section shows a list of requests for Julia Roberts on 11/10/2015 and 11/13/2015. The Reported Time Approvals section shows a table with columns for Name, TRC Category, Quantity Type, and Timesheet, with one entry for Angelina Jolie. The Absence Request section is currently empty.

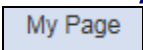

## Procedure

In this topic, you will review the time and labor dashboard.

Step	Action	Notes
1.	Click the <b>Time And Labor Dashboard</b> tab. 	
2.	The Time and Labor Dashboard is separate from the Manager Dashboard allowing Managers to view schedule deviations and act on overtime requests, absence requests, and reported time approvals.	
3.	When an employee submits an overtime request, leave request, or timesheet, their direct manager will be notified of the approval request via email and/or the Time and Labor Dashboard.  <b>Note:</b> If the direct manager does <b>not</b> approve the request prior to payroll processing, all pending requests will be routed to the manager's manager for review and approval.	
4.	Overtime requests and absence requests are displayed on the left side of the page.	
5.	Reported time approvals and schedule deviations are displayed on the right side of the page.	

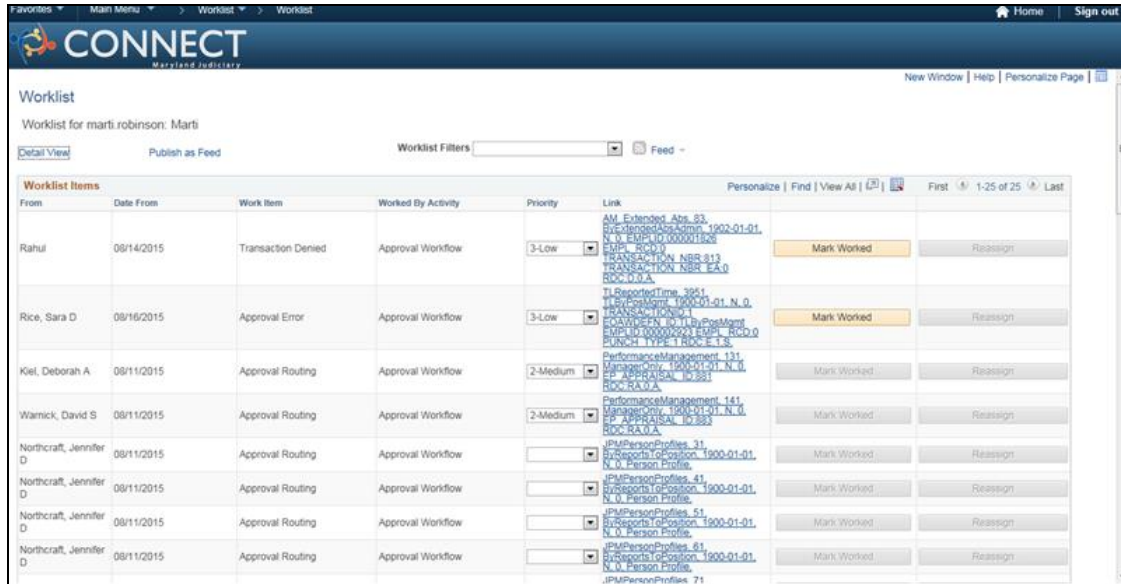
Step	Action	Notes
6.	Notice each approval section gives you the option to approve, deny, or pushback directly from the dashboard.  It is recommended however, that you click the employee's name for the desired request to view the request details, then approve, deny, or pushback.	
7.	The Selection Criteria fields allow you to enter specific criteria in order to filter the approval requests displayed on the dashboard.	
8.	Click the <b>Look up Last Name</b> button. 	
9.	Click the <b>Jolie</b> link. 	
10.	Click the <b>Search</b> button. 	
11.	Notice Angelina Jolie is now the only employee displayed on the dashboard.	
12.	Click the <b>Clear</b> button to clear the search criteria that was previously entered. 	
13.	Click the <b>Search</b> button. 	
14.	Notice that all approval requests are displayed on the dashboard.	
15.	Click the <b>Julia Roberts</b> link to view the details of her overtime request. 	
16.	View the request details. From this page, you can approve, deny, or pushback the request.	
17.	For this example, click the <b>Close (X)</b> button to close the Overtime Request Details page. 	
18.	Click the <b>Angelina Jolie</b> link to view the details of her absence request. 	
19.	View the request details.	
20.	Click the <b>Vertical</b> scrollbar to move down the page.	
21.	From this page, you can approve, deny, or pushback the request.	
22.	For this example, click the <b>Return</b> button. 	

Step	Action	Notes
23.	Click the <b>Angelina Jolie</b> link to view the details of her timesheet. 	
24.	By clicking in to the employee's reported time, you have the ability to select all rows of time or individual rows of time to approve, deny, or push back.	
25.	Click the checkbox for the 11/11/2015 row. 	
26.	At this point, you can approve, deny, or pushback a single row of time for Angelina.	
27.	Click the <b>Select All</b> link to select all rows. 	
28.	At this point, you can approve, deny, or push back all rows of time.	
29.	Click the <b>Deselect All</b> link to deselect all rows of time. 	
30.	For this example, click the <b>Return</b> button. 	
31.	If you want to <b>submit</b> time on behalf of one of your direct reports, you can navigate directly to their timesheet from the dashboard.  Click the <b>Timesheet</b> link for Angelina. 	
32.	Click the <b>Jolie</b> link. 	
33.	As a manager, you can:  1) Update and submit an employee's time 2) Approve the employee's time once it has been submitted  Use the Submit button to submit and the Approve button to approve.	
34.	Click the <b>Time and Labor Dashboard</b> menu. 	
35.	Click the <b>Vertical</b> scrollbar to move down the page.	

Step	Action	Notes
36.	<p>The Schedule Deviation graph is an analytical tool that shows the number of scheduled hours, scheduled hours to date, reported hours, approved hours, and the schedule deviation for your employees for the current time period.</p> <p>You can click into the graph or an employee name to view their time.</p>	
37.	You can navigate to previous or future time periods using the left and right arrows.	
38.	Click the <b>Vertical</b> scrollbar to move up the page.	
39.	<p>Click the <b>My Page</b> tab</p> 	
40.	<p>Click the <b>Sign out</b> link.</p> 	
41.	<p>You have completed the topic "Understanding the Time and Labor Dashboard".</p> <p><b>End of Procedure.</b></p>	



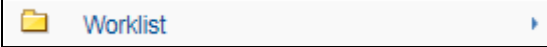

## Understanding Worklists

Worklists are prioritized lists of the work items that a person (or group of people) has to do.



## Procedure

In this topic you will review using the Worklist to view notification messages.

Step	Action	Notes
1.	Click in the <b>User ID</b> field.	
2.	Enter " <b>lee.robinson</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field.	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Worklist</b> menu. 	
8.	Click the <b>Worklist</b> menu. 	
9.	Worklists are prioritized lists of the work items that a person (or group of people) has to do.	

Step	Action	Notes
10.	<p>You can sort the worklist items by clicking on the headers of each column.</p> <p>For example: by clicking on the <b>Date From</b>, the items will sort by date.</p>	
11.	<p>When work is routed to a CONNECT user, it is put in the user's worklist. To work on an item, select it from the worklist and the appropriate page will open so you can begin work.</p>	
12.	<p>Click the <b>Home</b> link.</p> <p><b>Home</b></p>	
13.	<p>Click the <b>Sign out</b> link.</p> <p><b>Sign out</b></p>	
14.	<p>You have completed reviewing how to use the Worklist to view notification messages.</p> <p><b>End of Procedure.</b></p>	



## Time and Absence Approval Process

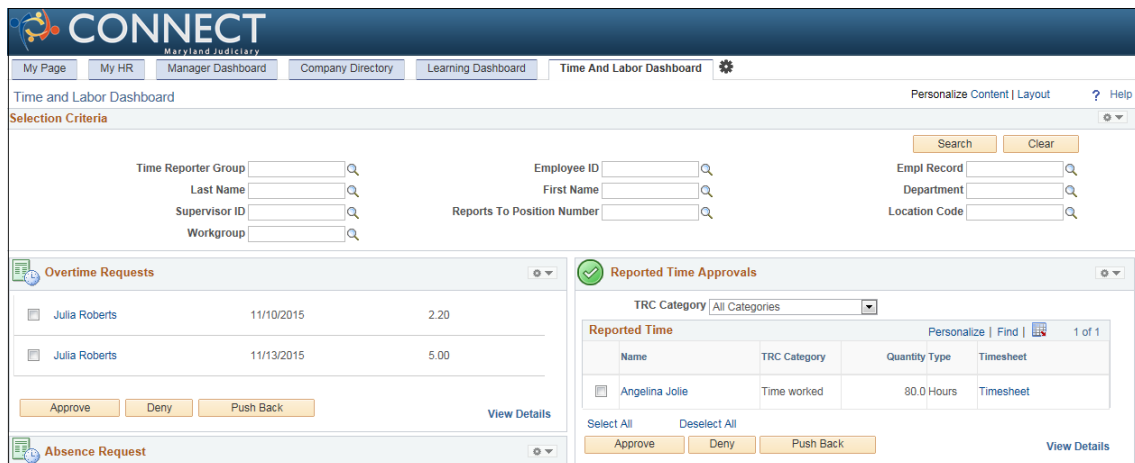
### Time and Absence Approvals

During this module you will review topics on:

- Approving a Timesheet from the Time and Labor Dashboard
- Review, Correct, Approve a Punch Timesheet
- Approving Overtime Request
- Approve Direct Report Absence Request
- Approve Direct Report Extended Absence Request - FMLA Take

### Approving a Timesheet from the Time and Labor Dashboard

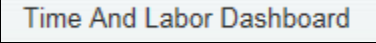
The Time and Labor Dashboard allows Managers to view schedule deviations and act on overtime requests, absence requests, and reported time approvals.



The screenshot shows the 'CONNECT Maryland Judiciary' interface. The 'Time and Labor Dashboard' is selected in the top navigation bar. Below the navigation bar, there are tabs for 'My Page', 'My HR', 'Manager Dashboard', 'Company Directory', 'Learning Dashboard', and 'Time And Labor Dashboard'. The 'Time and Labor Dashboard' is active, showing a 'Selection Criteria' section with search filters for Time Reporter Group, Employee ID, Last Name, First Name, Supervisor ID, Reports To Position Number, Empl Record, Department, and Location Code. Below the search filters, there are three main sections: 'Overtime Requests' (showing requests for Julia Roberts), 'Reported Time Approvals' (showing a request for Angelina Jolie), and 'Absence Request'. Each section has buttons for 'Approve', 'Deny', and 'Push Back', and a 'View Details' link.

## Procedure

In this topic, you will approve a timesheet from the time and labor dashboard.

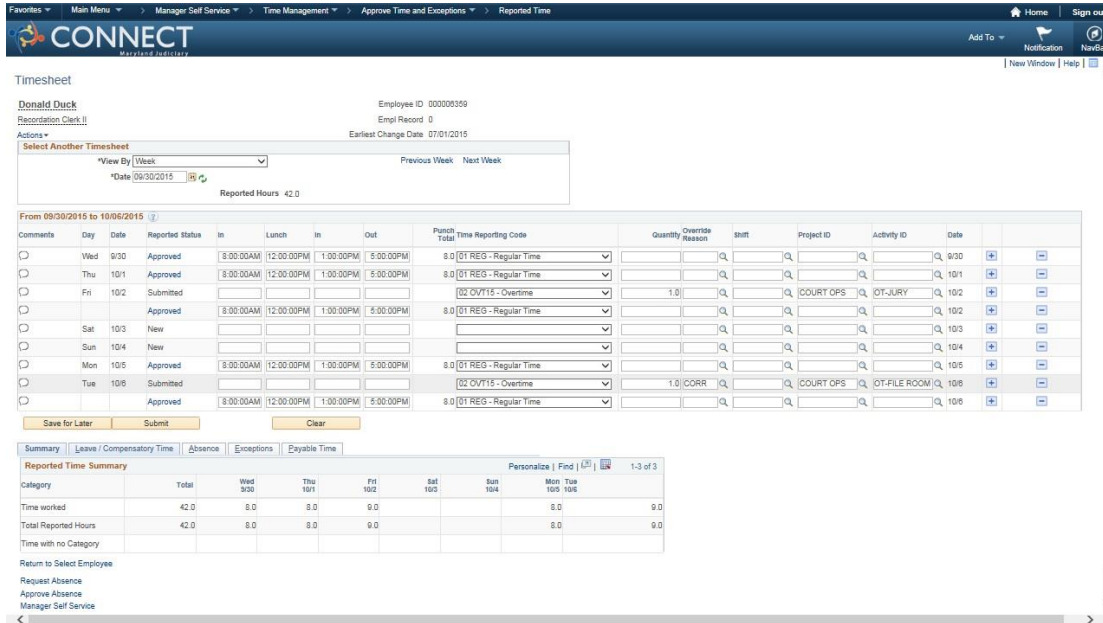
Step	Action	Notes
1.	Click the <b>Time And Labor Dashboard</b> tab. 	
2.	The Time and Labor Dashboard is separate from the Manager Dashboard allowing Managers to view schedule deviations and act on overtime requests, absence requests, and reported time approvals.	

Step	Action	Notes
3.	<p>When an employee submits an overtime request, leave request, or timesheet, their direct manager will be notified of the approval request via email and/or the Time and Labor Dashboard.</p> <p><b>Note:</b> If the direct manager does <b>not</b> approve the request prior to payroll processing, all pending requests will be routed to the manager's manager for review and approval.</p>	
4.	<p>You can approve, deny, or push back time directly from the Time and Labor Dashboard.</p> <p>However, it is recommended that you view the details of each employee's time before you choose an action.</p>	
5.	<p>Click the <b>Angelina Jolie</b> link to view the details of her timesheet.</p> <p><a href="#">Angelina Jolie</a></p>	
6.	<p>By clicking in to the employee's reported time, you have the ability to select all rows of time or individual rows of time to approve, deny, or push back.</p>	
7.	<p>Click the checkbox for the 11/11/2015 row.</p> <p><input type="checkbox"/></p>	
8.	<p>At this point, you can approve, deny, or pushback a single row of time for Angelina.</p>	
9.	<p>Push Back is used when the information requires a correction by the employee.</p> <p><b>NOTE:</b> Push Back only the line item that requires employee correction. They will have to edit each input for the day to resubmit for approval.</p> <p>Do not Push Back the timesheet unless the whole timesheet requires correction.</p>	
10.	<p>Once you complete an action, Approve, Deny, Push Back, the page will update and the item will be removed from the dashboard.</p>	
11.	<p>Click the <b>Select All</b> link to select all rows.</p> <p><a href="#">Select All</a></p>	
12.	<p>At this point, you can approve, deny, or push back all rows of time.</p>	
13.	<p>Click the <b>Deselect All</b> link to deselect all rows of time.</p> <p><a href="#">Deselect All</a></p>	
14.	<p>For this example, click the <b>Return</b> button.</p> <p><a href="#">Return</a></p>	

Step	Action	Notes
15.	<p>If you want to <b>submit</b> time on behalf of one of your direct reports, or make corrections, you can navigate directly to their timesheet from the dashboard.</p> <p>Click the <b>Timesheet</b> link for Angelina.</p> <p><b>Timesheet</b></p>	
16.	<p>Click the <b>Jolie</b> link.</p> <p><b>Jolie</b></p>	
17.	<p>As a manager, you can:</p> <ul style="list-style-type: none"> <li>1) Update and submit an employee's time</li> <li>2) Approve the employee's time once it has been submitted</li> </ul> <p>Use the Submit button to submit and the Approve button to approve.</p>	
18.	<p>Click the <b>Time and Labor Dashboard</b> menu.</p> <p><b>Time and Labor Dashboard</b></p>	
19.	<p>Click the <b>Sign out</b> link.</p> <p><b>Sign out</b></p>	
20.	<p>You have completed the topic "Approving a Timesheet from the Time and Labor Dashboard".</p> <p><b>End of Procedure.</b></p>	

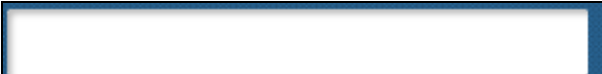
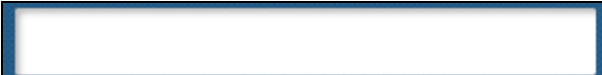


## Review, Correct, Approve a Punch Timesheet




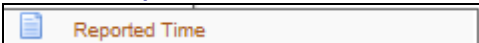







A Manager has the ability to review, correct, and approve an employee's submitted punch timesheet.

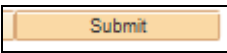


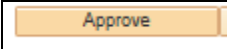
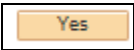
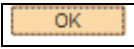
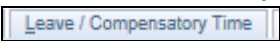
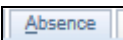




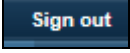
## Procedure

In this topic, you will review a direct report's punch timesheet, make a correction, and approve the time submitted.

Step	Action	Notes
1.	Click in the <b>User ID</b> field. 	
2.	Enter " <b>andrew.furletti</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field. 	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	

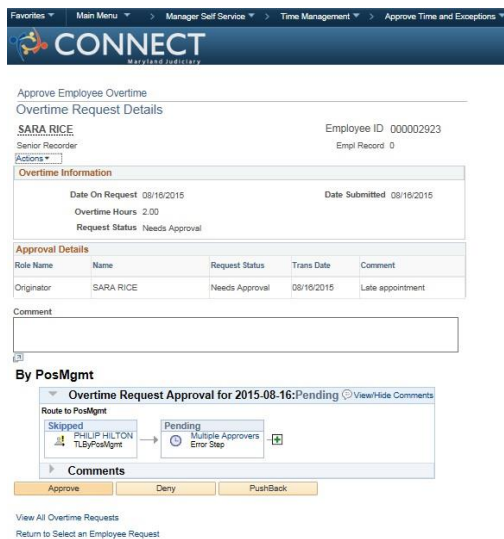
Step	Action	Notes
7.	Click the <b>Manager Self Service</b> menu. 	
8.	Click the <b>Time Management</b> menu. 	
9.	Click the <b>Approve Time and Exceptions</b> menu. 	
10.	Click the <b>Reported Time</b> menu. 	
11.	Click in the <b>Selection Criterion Value</b> field. 	
12.	Enter " <b>Duck</b> " into the <b>Selection Criterion Value</b> field.	
13.	Click the <b>Get Employees</b> button. 	
14.	Click the <b>Duck</b> link. 	
15.	Prior to approving time, a Manager should review the employee's timesheet to verify its accuracy. Best practice is to request the employee correct the time, however if the Manager must correct the time, they will need to use an override reason code to document the reason for the change.  The Comments bubble in Timesheet can be used for additional information as well.	
16.	If the overtime is related to a project, the Manager would select a Project and Activity ID.  Click the <b>Look up Activity ID</b> button. 	
17.	Click the <b>OT-FILE ROOM</b> link. 	
18.	Click the <b>Look up Override Reason</b> button. 	
19.	Use the Override Reason code to document the reason why the Manager is editing the employee's time.  Click the <b>CORR</b> link. 	

Step	Action	Notes
20.	Click the <b>Submit</b> button. 	
21.	Click the <b>OK</b> button. 	
22.	As Manager, you have the option of pushing back the entire timesheet or pushing back only the rows that need to be corrected. In the Timesheet section, you can <b>Select</b> the individual rows to be pushed back by checking the Select column next to that row or you can click the <b>Select All</b> button to push back the entire timesheet.	
23.	<b>Please note:</b> If you push back an entire timesheet, you will receive an email notification for <b>each field</b> on the timesheet. It is recommended that you <b>only</b> push back the row that needs to be corrected.  Once you have made your selection, click the <b>Push Back</b> button in the Approval section.	
24.	Click the <b>Select All</b> button. 	
25.	Click the <b>Approve</b> button. 	
26.	Click the <b>Yes</b> button. 	
27.	Click the <b>OK</b> button. 	
28.	The Summary tab summarizes worked overtime and comp time hours by day.	
29.	Click the <b>Leave / Compensatory Time</b> tab. 	
30.	Leave and Comp Time balances can be viewed on the Leave/Compensatory Time tab.	
31.	Click the <b>Absence</b> tab. 	
32.	Click the <b>Vertical</b> scrollbar to move down the page.	

Step	Action	Notes
33.	The Absence tab can be used to launch an absence request. This topic will be explored in more detail in the Absence Management UPKs.  All accrued absence balances can be viewed at the bottom of the timesheet page.	
34.	Click the <b>Exceptions</b> tab. 	
35.	Click the <b>Home</b> link. 	
36.	Click the <b>Sign out</b> link. 	
37.	You have completed the Review, Correct, Approve a Punch Timesheet topic. <b>End of Procedure.</b>	

## Approving Overtime Request

A Manager has the ability to approve an employee's request for overtime.



Approve Employee Overtime  
Overtime Request Details

SARA RICE Employee ID 000002923  
Senior Recorder Empl Record 0

Actions ▼

**Overtime Information**

Date On Request 08/16/2015 Date Submitted 08/16/2015  
Overtime Hours 2.00  
Request Status Needs Approval

**Approval Details**

Role Name	Name	Request Status	Trans Date	Comment
Originator	SARA RICE	Needs Approval	08/16/2015	Late appointment

Comment

By PosMgmt

Overtime Request Approval for 2015-08-16: Pending View/Hide Comments

Route to PosMgmt

Skipped PHILIP HILTON TLByPosMgmt → Pending Multiple Approvers Error Step






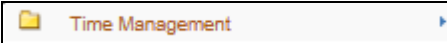




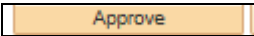
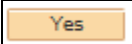
Comments

Approve Deny PushBack



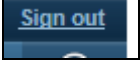
View All Overtime Requests  
Return to Select an Employee Request

## Procedure

In this topic, we are approving a request to work overtime by an employee.

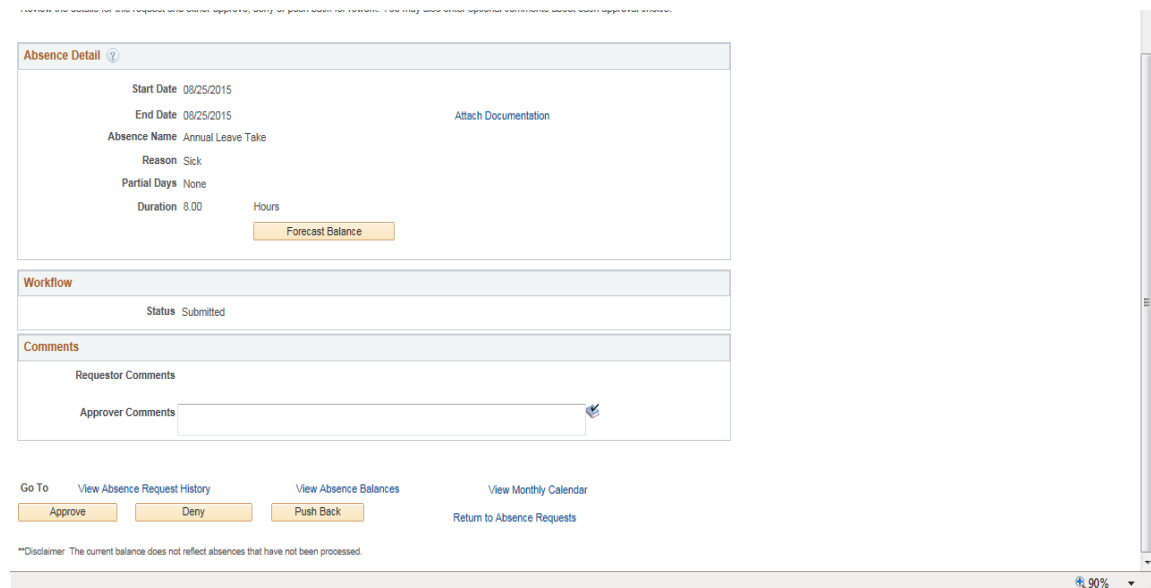
Step	Action	Notes
1.	Click in the <b>User ID</b> field. 	
2.	Enter " <b>dennis.scott</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field. 	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Manager Self Service</b> menu. 	
8.	Click the <b>Time Management</b> menu. 	
9.	Click the <b>Approve Time and Exceptions</b> menu. 	
10.	Click the <b>Overtime Requests</b> menu. 	
11.	For this example, you are approving an overtime request submitted by Sara Rice.	
12.	Click the <b>Get Employees</b> button to pull up employees that have already submitted an unapproved overtime request.  Not all the Manager's direct reports will appear in this list. 	
13.	Managers have the ability to Approve, Deny, or Push Back an overtime request.	
14.	Click the <b>RICE</b> link. 	
15.	Click the <b>Approve</b> button. 	
16.	Click the <b>Yes</b> button to confirm approval of the overtime request. 	



Step	Action	Notes
17.	Click the <b>OK</b> button. 	
18.	Click the <b>Home</b> link. 	
19.	Click the <b>Sign out</b> link. 	
20.	You have completed the Approving Overtime Request topic. <b>End of Procedure.</b>	

## Approve Direct Report Absence Request

### Approve Direct Report Absence Request



**Absence Detail** ?

Start Date: 08/25/2015  
End Date: 08/25/2015 [Attach Documentation](#)  
Absence Name: Annual Leave Take  
Reason: Sick  
Partial Days: None  
Duration: 8.00 Hours  
[Forecast Balance](#)

**Workflow**

Status: Submitted

**Comments**



Requestor Comments  
Approver Comments

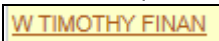

Go To: [View Absence Request History](#) [View Absence Balances](#) [View Monthly Calendar](#)  
[Approve](#) [Deny](#) [Push Back](#) [Return to Absence Requests](#)

\*\*Disclaimer: The current balance does not reflect absences that have not been processed.

## Procedure

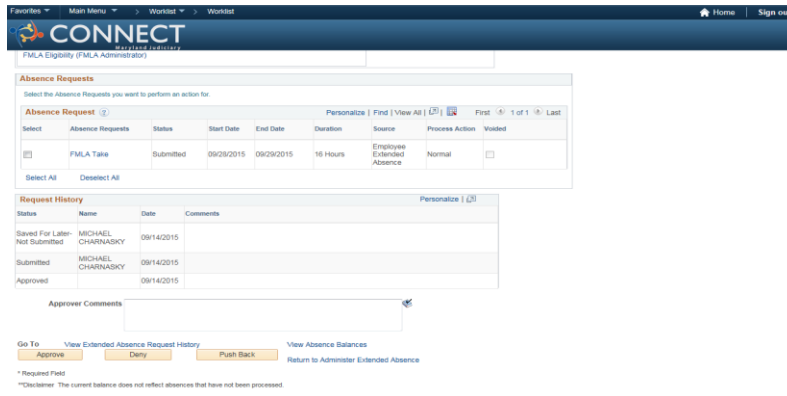
In this topic, you will approve an absence request for a direct report.

Step	Action	Notes
1.	Click in the <b>User ID</b> field. 	
2.	Enter " <b>gary.leasure</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field. 	

Step	Action	Notes
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Manager Self Service</b> menu. 	
8.	Click the <b>Time Management</b> menu. 	
9.	Click the <b>Approve Time and Exceptions</b> menu. 	
10.	Click the <b>Absence Requests</b> menu. 	
11.	The Absence Requests page automatically defaults to show requests that are Pending approval. You can change the view to Approved or Denied requests by clicking the drop down menu then clicking the Refresh button.	
12.	Click the <b>W TIMOTHY FINAN</b> link to view the details of the absence request. 	
13.	Click the <b>Vertical</b> scrollbar to move down the page.	
14.	Click the <b>Approve</b> button. 	
15.	Click the <b>Yes</b> button to approve. 	
16.	Click the <b>OK</b> button. 	
17.	Click the <b>Home</b> link. 	
18.	Click the <b>Sign out</b> link. 	
19.	You have completed the Approve Direct Report Absence Request topic. <b>End of Procedure.</b>	

## Approve Direct Report Extended Absence Request - FMLA Take







### Approve Direct Report Extended Absence Request - FMLA Take


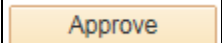
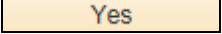
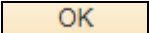
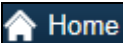
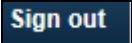


The screenshot shows the 'Absence Requests' section of the CONNECTed FMLA Administrator interface. It includes a table with columns: Select, Absence Requests, Status, Start Date, End Date, Duration, Source, Process Action, and Validated. A single request is listed with status 'Submitted' and duration '16 Hours'. Below this is the 'Request History' section with columns: Status, Name, Date, and Comments. It shows a history of actions: 'Saved For Later', 'Not Submitted', 'Submitted', and 'Approved' for user 'MICHAEL CHARNASKY' on 09/14/2015. At the bottom, there are buttons for 'Go To: Approve', 'Deny', 'Push Back', and 'Return to Administer Extended Absence'.

## Procedure

In this topic, you will approve an FMLA take extended absence request for a direct report.

Step	Action	Notes
1.	Click in the <b>User ID</b> field.	
2.	Enter " <b>alexandra.williams</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field.	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Worklist</b> menu. 	
8.	Click the <b>Worklist</b> menu. 	
9.	To sort the worklist items, Click the <b>Date From</b> column header. 	
10.	To sort the worklist items, Click the <b>Date From</b> column header 2 times. The most recent worklist item will be first. 	

Step	Action	Notes
11.	Click the <b>AM_Extended_Abs</b> link for Charnasky, Michael S.	
12.	Click the <b>Vertical</b> scrollbar to move down the page.	
13.	<p>The Absence Request section displays the details of the employee's FMLA extended absence request.</p> <p>Click the <b>Select</b> checkbox for FMLA Take.</p> 	
14.	<p>Click the <b>Approve</b> button.</p> 	
15.	<p>Click the <b>Yes</b> button to approve.</p> 	
16.	<p>Click the <b>OK</b> button.</p> 	
17.	<p>Click the <b>Home</b> link.</p> 	
18.	<p>Click the <b>Sign out</b> link.</p> 	
19.	<p>You have completed the Approve Direct Report Extended Absence Request - FMLA Take topic.</p> <p><b>End of Procedure.</b></p>	

## Recruitment Processes

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### Recruitment Processes

During this module you will review topics on:

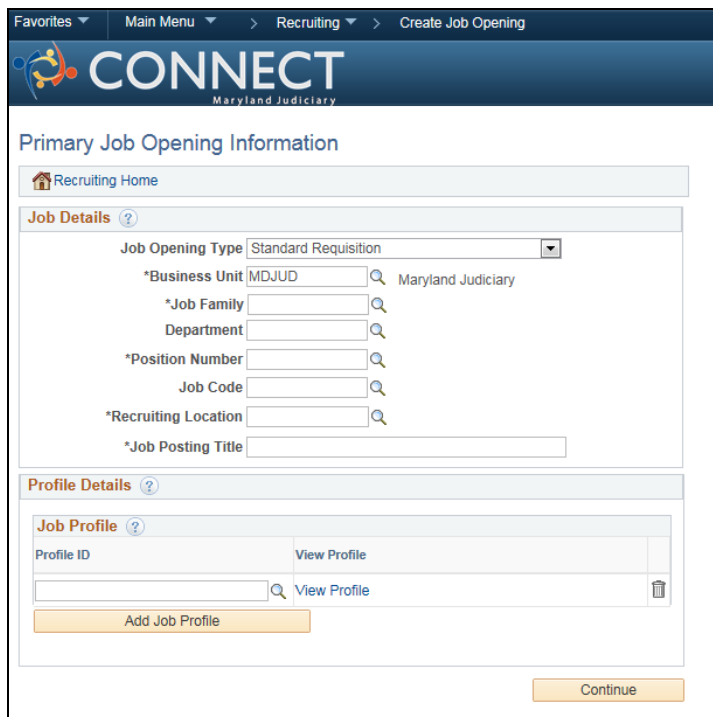
- Creating a Job Opening and Entering Job Details
- Viewing Applicant Activity
- Scheduling Applicant Interviews
- Completing an Interview Evaluation
- Recording the Final Interview Recommendation

### Creating a Job Opening and Entering Job Details

---

Create a Job Opening and Enter Job Details

This topic will demonstrate the process of creating a job opening by providing both high level and detailed information about the position.



Navigation: Favorites ▾ Main Menu ▾ > Recruiting ▾ > Create Job Opening

**CONNECT**  
Maryland Judiciary

### Primary Job Opening Information

[Recruiting Home](#)

#### Job Details ?

Job Opening Type: Standard Requisition ▾

\*Business Unit: MDJUD [Maryland Judiciary](#)

\*Job Family: [View Profile](#)

Department: [View Profile](#)

\*Position Number: [View Profile](#)

Job Code: [View Profile](#)

\*Recruiting Location: [View Profile](#)

\*Job Posting Title:

#### Profile Details ?

##### Job Profile ?




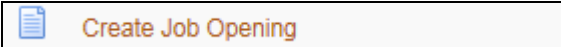

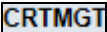





Profile ID:  [View Profile](#)

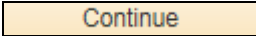
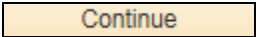

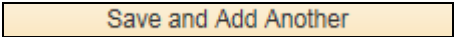
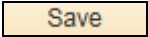
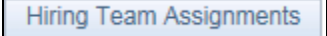
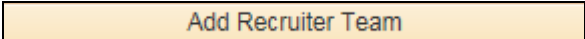

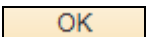
[View Profile](#) [Add Job Profile](#)


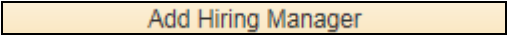

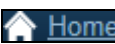

[Continue](#)

## Procedure

In this topic, a Hiring Manager creates a job opening and enters job details such as work experience and degrees required and also assigns the Hiring Team.

Step	Action	Notes
1.	Click in the <b>User ID</b> field.	
2.	Enter " <b>david.warnick</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field.	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Recruiting</b> menu. 	
8.	Click the <b>Create Job Opening</b> menu. 	
9.	In this section, you will enter all required information which will be marked with an asterisk.	
10.	Click in the <b>Job Family</b> field. 	
11.	Enter " <b>CRTMGT</b> " into the <b>Job Family</b> field.	
12.	Click the <b>CRTMGT</b> object. 	
13.	Click in the <b>Position Number</b> field. 	
14.	Enter " <b>086611</b> " into the <b>Position Number</b> field.	
15.	Click the <b>086611</b> object. 	
16.	Click in the <b>Recruiting Location</b> field. 	
17.	Enter " <b>1002</b> " into the <b>Recruiting Location</b> field.	
18.	Click in the <b>Profile ID</b> field. 	
19.	Enter " <b>601001</b> " into the <b>Profile ID</b> field.	
20.	Click the <b>601001</b> object. 	

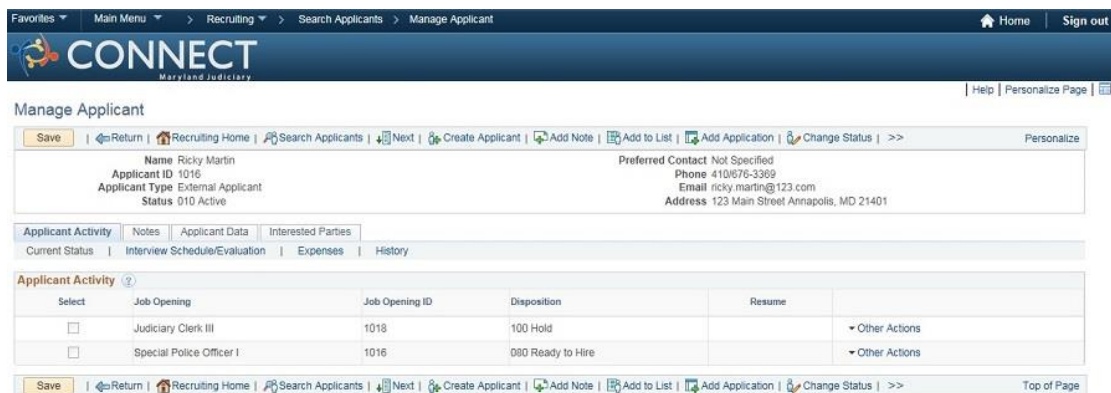
Step	Action	Notes
21.	Click the <b>Continue</b> button. 	
22.	Click the <b>Update Primary Profile</b> option. 	
23.	Click the <b>Continue</b> button. 	
24.	Click in the <b>Desired Start Date</b> field. 	
25.	Enter "08/30/2015" into the <b>Desired Start Date</b> field.	
26.	Click the <b>Vertical</b> Scroll bar to move down the page.	
27.	Click the <b>Highest Education Level</b> drop-down list.	
28.	Click the <b>C-HS Graduate or Equivalent</b> list item.	
29.	Click in the <b>Years of Work Experience</b> field. 	
30.	Enter "3" into the <b>Years of Work Experience</b> field.	
31.	Click the <b>Add Degrees</b> button. 	
32.	Enter "BA" into the <b>Degree</b> field.	
33.	Click the <b>Bachelor of Arts</b> object. 	
34.	Click the <b>Save and Add Another</b> button. 	
35.	Enter "bs" into the <b>Degree</b> field.	
36.	Click the <b>Save</b> button. 	
37.	Click the <b>Vertical</b> Scroll bar to move up the page.	
38.	Click the <b>Hiring Team Assignments</b> tab. 	
39.	Click the <b>Add Recruiter Team</b> button. 	
40.	Click the <b>Select</b> option for AOC Recruitment Team. 	
41.	Click the <b>OK</b> button. 	
42.	A Primary Recruiter must be selected for all job openings.	

Step	Action	Notes
43.	Click the <b>Primary</b> option next to MARCY GOODE. 	
44.	Click the <b>Add Hiring Manager</b> button. 	
45.	Click in the <b>Name</b> field.	
46.	Enter " <b>David Warnick</b> " into the <b>Name</b> field.	
47.	Click the <b>Vertical</b> Scroll bar to move down the page.	
48.	Click the <b>Save and Submit</b> button. 	
49.	Click the <b>Home</b> link. 	
50.	Click the <b>Sign out</b> link. 	
51.	You have completed the topic "Creating a Job Opening and Entering Job Details." <b>End of Procedure.</b>	

## Viewing Applicant Activity

### Viewing Applicant Activity

This topic demonstrates the process for viewing applicant activities such as their current status, interview schedules and evaluations, expenses, and history.



Manage Applicant




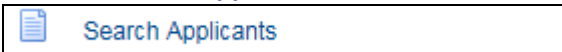


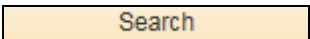


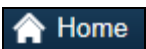
Applicant Activity | Notes | Applicant Data | Interested Parties | Current Status | Interview Schedule/Evaluation | Expenses | History

Select	Job Opening	Job Opening ID	Disposition	Resume	Other Actions
<input type="checkbox"/>	Judiciary Clerk III	1018	100 Hold		Other Actions
<input type="checkbox"/>	Special Police Officer I	1016	080 Ready to Hire		Other Actions

## Procedure

In this topic, the Hiring Manager views the applicant's activity.



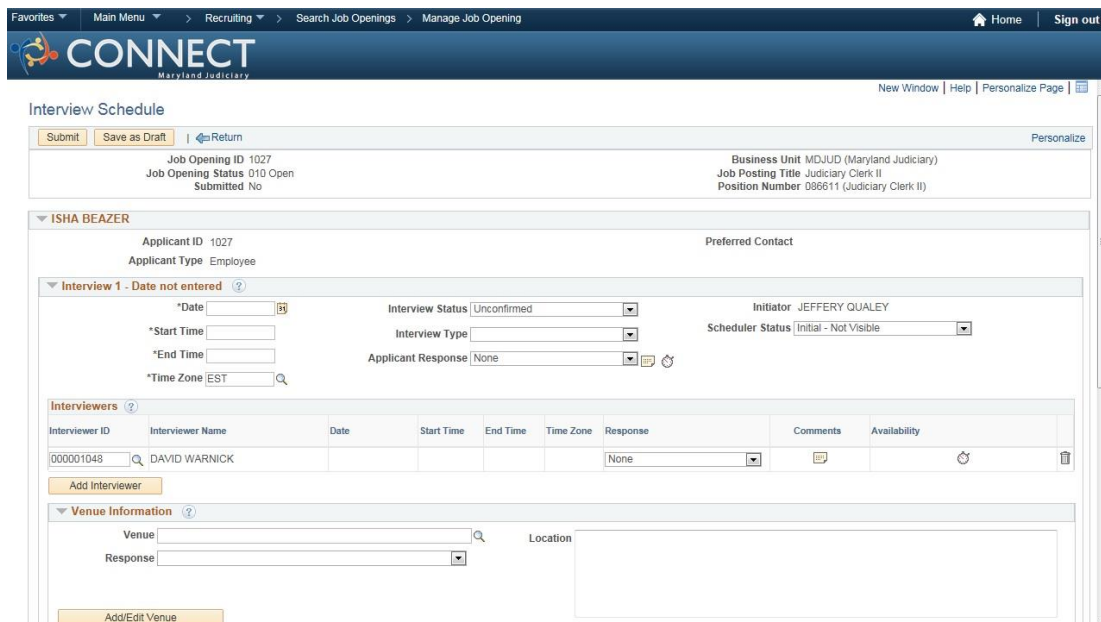
Step	Action	Notes
1.	Click in the <b>User ID</b> field.	
2.	Enter " <b>jeffery.quailey</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field.	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Recruiting</b> menu. 	
8.	Click the <b>Search Applicants</b> menu. 	
9.	Click the <b>Search My Applicants</b> option to uncheck the box. 	
10.	Click in the <b>Last Name</b> field. 	
11.	Enter " <b>Martin</b> " into the <b>Last Name</b> field.	
12.	If you are unsure of the last name of the applicant, you can leave this field blank and click search.	
13.	Click the <b>Search</b> button. 	
14.	Click the <b>Ricky Martin</b> link. 	
15.	Here, you can see the <b>current status</b> of the Mr. Martin's applications.	
16.	Click the <b>History</b> link. 	
17.	Here, you can view Mr. Martin's entire applicant history.  You can click different links to view the applicant's file.	
18.	Click the <b>Home</b> link. 	

Step	Action	Notes
19.	Click the <b>Sign out</b> link. <b>Sign out</b>	
20.	You have completed the topic "Viewing Applicant Activity". <b>End of Procedure.</b>	

## Scheduling Applicant Interviews

### Scheduling Applicant Interviews

This topic will demonstrate the process for scheduling an applicant interview. You can schedule applicant interviews at any time in the recruiting process, whether or not the applicant is associated with a job opening.


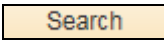







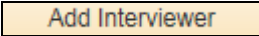

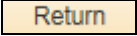

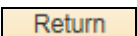

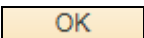
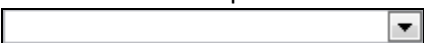


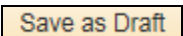
The screenshot shows the 'Interview Schedule' form in the CONNECTed Maryland Judiciary system. The form is for Job Opening ID 1027, Job Opening Status 010 Open, Submitted No. The Business Unit is MDJUD (Maryland Judiciary), Job Posting Title is Judiciary Clerk II, and Position Number is 096811 (Judiciary Clerk II). The applicant is ISHA BEAZER, Applicant ID 1027, Applicant Type Employee. The form includes fields for Interview 1 - Date not entered, Interview Status (Unconfirmed), Interview Type, Interview Date, Start Time, End Time, Time Zone, Initiator (JEFFERY QUALEY), Scheduler Status (Initial - Not Visible), Applicant Response (None), and a table for Interviewers. The Interviewers table has columns for Interviewer ID, Interviewer Name, Date, Start Time, End Time, Time Zone, Response, Comments, and Availability. The Venue Information section includes fields for Venue, Response, and Location.


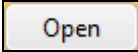


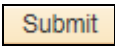
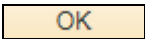
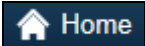
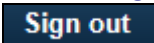
## Procedure

In this topic, a recruiter will schedule an applicant interview.

Step	Action	Notes
1.	Click in the <b>User ID</b> field.	
2.	Enter " <b>jeffery.qualey</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field.	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	

Step	Action	Notes
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Recruiting</b> menu. 	
8.	Click the <b>Search Job Openings</b> menu. 	
9.	Click in the <b>Job Opening ID</b> field. 	
10.	Enter " <b>1027</b> " into the <b>Job Opening ID</b> field.	
11.	Click the <b>Search</b> button. 	
12.	Click the <b>Judiciary Clerk II</b> link. 	
13.	Click the <b>Manage Interviews</b> button. 	
14.	Click in the <b>Date</b> field. 	
15.	Enter " <b>09/15/2015</b> " into the <b>Date</b> field.	
16.	Click in the <b>Start Time</b> field. 	
17.	Enter " <b>10:30AM</b> " into the <b>Start Time</b> field.	
18.	Click the <b>End Time</b> field. 	
19.	Enter " <b>11:30AM</b> " into the <b>End Time</b> field.	
20.	Click the <b>Interview Type</b> drop-down list. 	
21.	Click the <b>Onsite Interview</b> list item. 	
22.	Because this interview has a job opening attached, the Interviewer will auto-populate with the hiring manager attached to that job opening.	

Step	Action	Notes
23.	Click the <b>Add Interviewer</b> button. 	
24.	Enter " <b>00000828</b> " into the <b>Interviewer ID</b> field.	
25.	Click the <b>Availability</b> button. 	
26.	The Interview Schedule page shows that Connie Green has open availability.	
27.	Click the <b>Return</b> button. 	
28.	Click the <b>Availability</b> button. 	
29.	Click the <b>Return</b> button. 	
30.	Click the <b>Comments</b> button for DAVID WARNICK. 	
31.	Enter " <b>Please let me know if this time conflicts with another appointment.</b> " into the <b>Comments</b> field.	
32.	Click the <b>OK</b> button. 	
33.	Click the <b>Vertical</b> scroll bar to move down the page.	
34.	Click in the <b>Location</b> field.	
35.	Enter " <b>508 Taylor Avenue Annapolis, MD 21401</b> " into the <b>Location</b> field.	
36.	Click the <b>Letter</b> drop-down list. 	
37.	Click the <b>Interview Letter IS1</b> list item. 	
38.	Click in the <b>Date Printed</b> field. 	
39.	Enter " <b>09/03/2015</b> " into the <b>Date Printed</b> field.	
40.	You will not be able to view the Interview Letter until you save the page.	
41.	Click the <b>Save as Draft</b> button. 	
42.	Click the <b>Vertical</b> scroll bar to move down the page.	

Step	Action	Notes
43.	Click the <b>Generate Letter</b> button. 	
44.	Click the <b>Open</b> button. 	
45.	Click the <b>X</b> button. 	
46.	Click the <b>X</b> to exit out of tab. 	
47.	Click the <b>Submit</b> button. 	
48.	Click the <b>OK</b> button. 	
49.	Click the <b>Home</b> link. 	
50.	Click the <b>Sign out</b> link. 	
51.	You have completed the topic "Scheduling Applicant Interviews". <b>End of Procedure.</b>	

## Completing an Interview Evaluation






### Completing an Interview Evaluation


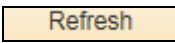


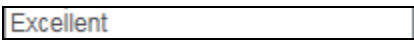

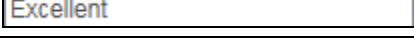

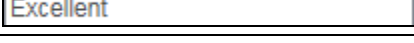
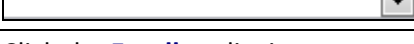
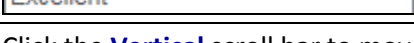



This topic will demonstrate the process for completing an Interview Evaluation. Interview evaluations are specific to the context of a particular job opening (or an application without a job opening). To complete an evaluation, evaluators assign ratings for individual evaluation categories, give an overall rating and recommendation, and enter any comments.


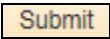




## Procedure

In this topic, the Hiring Manager begins and completes an Interview Evaluation.

Step	Action	Notes
1.	Click in the <b>User ID</b> field.	
2.	Enter " <b>david.warnick</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field.	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Self Service</b> menu. 	
8.	Click the <b>Recruiting</b> menu. 	
9.	Click the <b>Interview Evaluations</b> menu. 	
10.	A specified time period must be entered in order to view applicants.	

Step	Action	Notes
11.	Click in the <b>Show Interviews Between</b> field. 	
12.	Enter " <b>09/01/2015</b> " into the <b>Show Interviews Between</b> field.	
13.	Click in the <b>and</b> field. 	
14.	Enter " <b>10/01/2015</b> " into the <b>and</b> field.	
15.	Click the <b>Refresh</b> button. 	
16.	Click the <b>Evaluate Applicant</b> link. 	
17.	Click the <b>Interview Rating</b> drop-down list for Communications skills. 	
18.	Click the <b>Excellent</b> list item. 	
19.	Click the <b>Interview Rating</b> drop-down list for Education/Training. 	
20.	Click the <b>Excellent</b> list item. 	
21.	Click the <b>Vertical</b> scroll bar to move down the page.	
22.	Click the <b>Interview Rating</b> drop-down list for Work Experience. 	
23.	Click the <b>Excellent</b> list item. 	
24.	Click the <b>Interview Rating</b> drop-down list for Technical Skills. 	
25.	Click the <b>Excellent</b> list item. 	
26.	Click the <b>Vertical</b> scroll bar to move up the page.	
27.	Click the <b>Overall Rating</b> drop-down list. 	
28.	Click the <b>Excellent</b> list item. 	
29.	Click the <b>Recommendation</b> drop-down list. 	

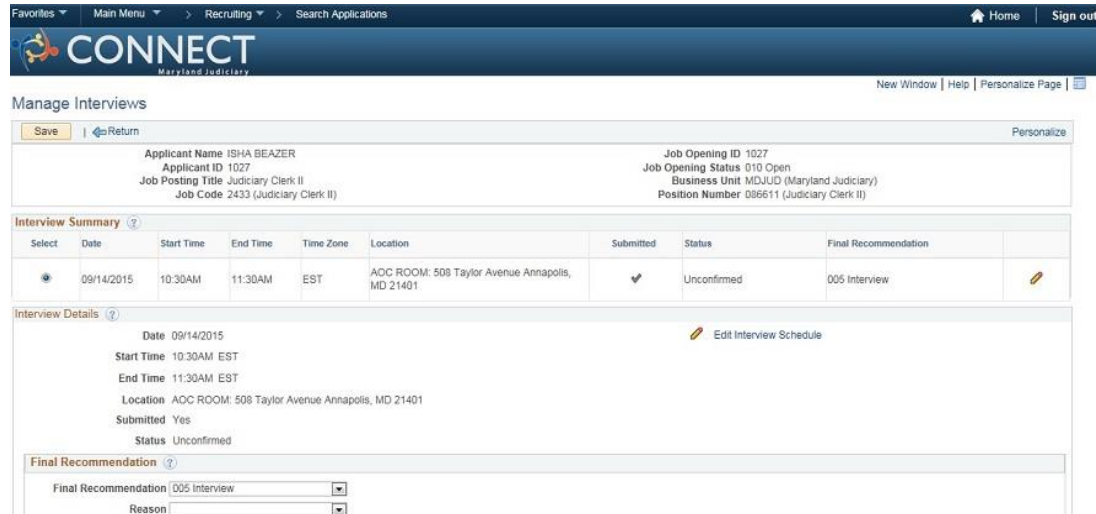
Step	Action	Notes
30.	Click the <b>020 Make Offer</b> list item. 	
31.	Click in the <b>Comments</b> field.	
32.	Enter " <b>Great Candidate.</b> " into the <b>Comments</b> field.	
33.	Click the <b>Submit</b> button. 	
34.	Click the <b>Home</b> link. 	
35.	Click the <b>Sign out</b> link. 	
36.	You have completed the topic "Completing an Interview Evaluation". <b>End of Procedure.</b>	



## Recording the Final Interview Recommendation





### Recording the Final Interview Recommendation



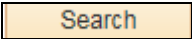



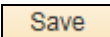
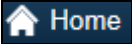

This topic will demonstrate the process of giving a final interview recommendation for an applicant. Examples of recommendations are "Make Offer", "Reject", or "Hold".



## Procedure

In this topic, the Hiring Manager completes the Final Interview Recommendation.

Step	Action	Notes
1.	Click in the <b>User ID</b> field.	
2.	Enter " <b>david.warnick</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field.	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Recruiting</b> menu. 	
8.	Click the <b>Search Applications</b> menu. 	

Step	Action	Notes
9.	Click the <b>Search My Applicants</b> box to uncheck. 	
10.	Click in the <b>Last Name</b> field. 	
11.	Enter " <b>Baezer</b> " into the <b>Last Name</b> field.	
12.	Click the <b>Search</b> button. 	
13.	Click the <b>Manage Interviews</b> button. 	
14.	The Manage Interviews page will give you access to the date and time of the interview as well as interview details.	
15.	Click the <b>Final Recommendation</b> drop-down list. 	
16.	Click the <b>020 Make Offer</b> list item. 	
17.	Click the <b>Save</b> button. 	
18.	Click the <b>Home</b> link. 	
19.	Click the <b>Sign out</b> link. 	
20.	You have completed the topic "Recording the Final Interview Recommendation". <b>End of Procedure.</b>	

## Delegation of Manager Tasks

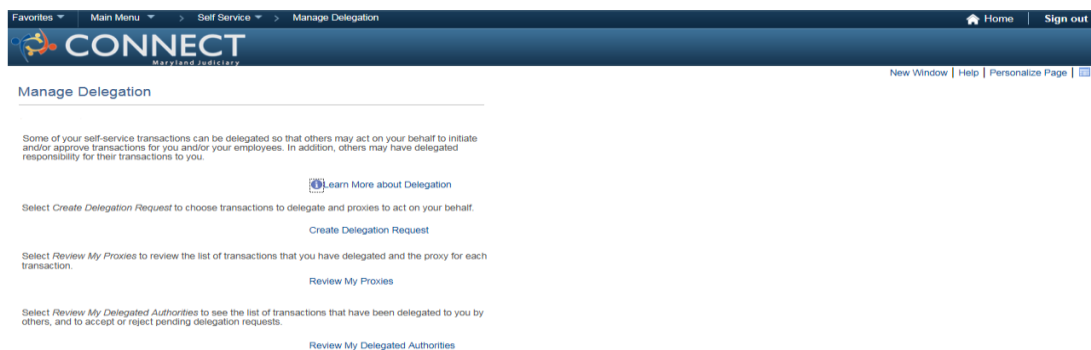
### Delegation of Manager Tasks

During this module you will review topics on:

- Understanding Delegation Management
- Delegate Transactions
- Accepting or Rejecting Delegation Authorities
- Reviewing Delegation Proxies
- Revoking Delegation Proxies

## Understanding Delegation Management

Manage Delegation allows the user to view their delegation activity.



## Procedure

This topic will describe how Manage Delegations.

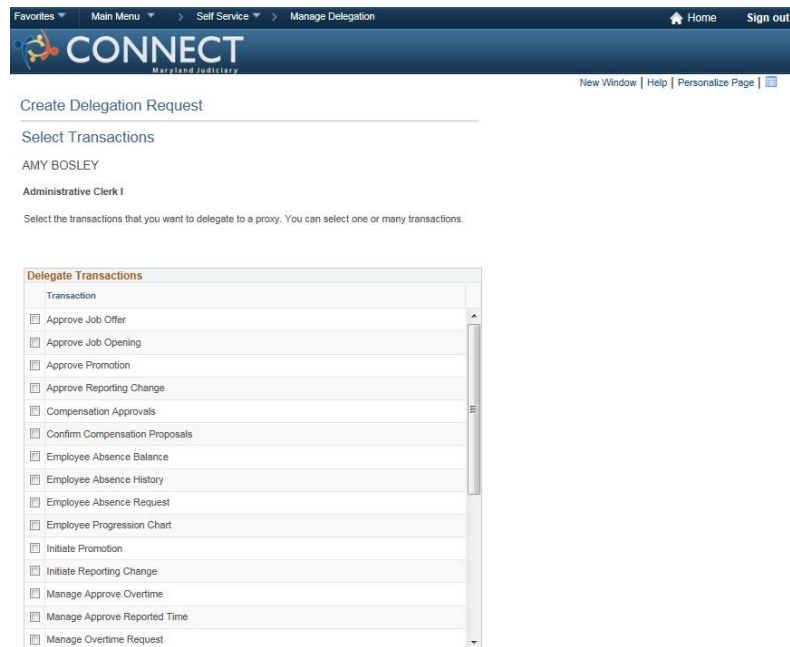
Step	Action	Notes
1.	Click in the <b>User ID</b> field.	
2.	Enter " <b>marti.robinson</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field.	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	

Step	Action	Notes
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Self Service</b> menu. 	
8.	Click the <b>Manage Delegation</b> menu. 	
9.	Delegation is when a person authorizes another to serve as their representative for a particular transaction during a specific time frame.  For example, a manager takes leave and wants to delegate their managerial transactions to another manager/employee while away from the office.	
10.	<b>Learn More about Delegation</b> - Learn the definition of delegation, how to manage delegations and FAQs.	
11.	<b>Create Delegation Request</b> - Delegate one or more transactions to another person that may act on your behalf for initiations or approvals.	
12.	<b>Review My Proxies</b> - Searching and updating the status of the delegation requests.  For example, here is where a delegator can revoke a delegation requests.	
13.	<b>Review My Delegated Authorities</b> - You can accept or reject the delegation requests.	
14.	Click the <b>Home</b> link. 	
15.	Click the <b>Sign out</b> link. 	
16.	You have completed the Manage Delegation topic. <b>End of Procedure.</b>	

## Delegate Transactions




### Delegating Job Offer and Opening Approvals

This topic demonstrates the process for delegating transactions. Connect uses delegation to authorize one person to serve as another person's representative when performing specific job duties.

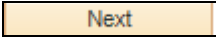

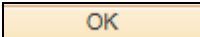
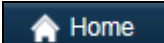



## Procedure

In this topic, an Administrative Official delegates approval responsibilities for Job Offers and Job Openings to a Hiring Manager.

Step	Action	Notes
1.	Click in the <b>User ID</b> field. 	
2.	Enter " <b>amy.bosley</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field. 	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	

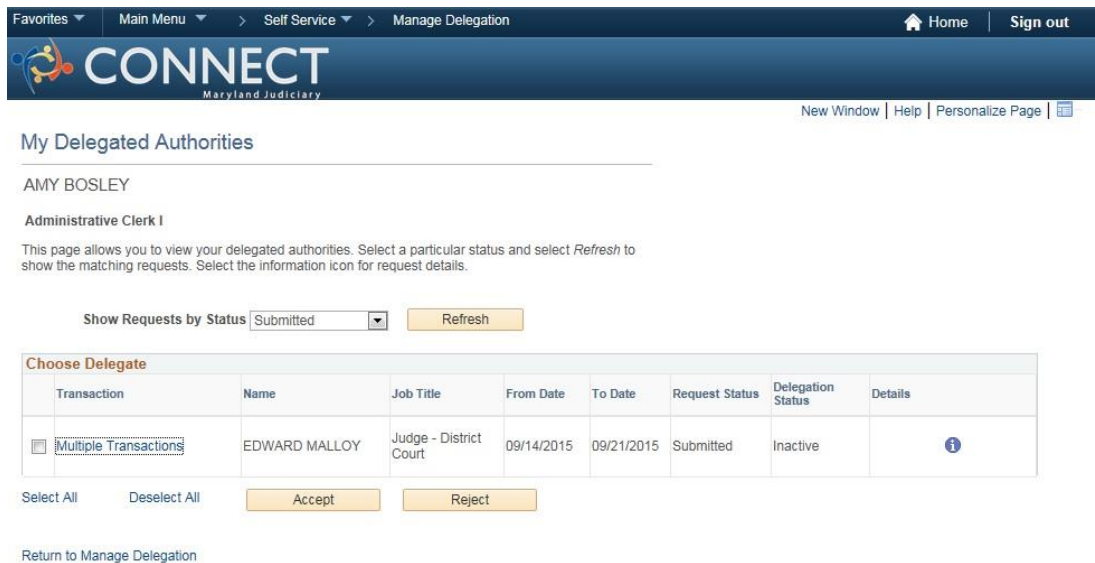
Step	Action	Notes
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Self Service</b> menu. 	
8.	Click the <b>Manage Delegation</b> menu. 	
9.	Click the <b>Create Delegation Request</b> link. 	
10.	A date range must be entered in order to delegate responsibilities.	
11.	Click in the <b>From Date</b> field. 	
12.	Press <b>[Backspace]</b> .	
13.	Enter " <b>11/20/2015</b> " into the <b>From Date</b> field.	
14.	Click in the <b>To Date</b> field. 	
15.	Enter " <b>11/30/2015</b> " into the <b>To Date</b> field.	
16.	Click the <b>Next</b> button. 	
17.	Here, you are able to delegate multiple responsibilities. In this example, we will delegate the "Approve Job Offer" and "Approve Job Opening" responsibilities. <b>Note:</b> this list will vary based on the user's role.	
18.	Click the <b>Approve Job Offer</b> option. 	
19.	Click the <b>Approve Job Opening</b> option. 	
20.	Click the <b>Next</b> button. 	
21.	Now you will choose your delegate for the transactions selected.  Click the <b>DAVID WARNICK</b> option. 	
22.	Click the <b>Vertical</b> Scroll bar to move down the page.	

Step	Action	Notes
23.	Click the <b>Next</b> button. 	
24.	Before submitting, review the Delegation Detail page to confirm the information is correct.	
25.	Click the <b>Submit</b> button. 	
26.	Once you submit your request the proxy will receive notification to either 'Accept' or 'Decline' the request. Once accepted the proxy will receive notifications for the transactions selected as well as see the alerts in their dashboards (depending on which transactions have been delegated).  Click the <b>OK</b> button. 	
27.	You may always review your proxies and revoke access prior to expiration.	
28.	Click the <b>Home</b> link. 	
29.	Click the <b>Sign out</b> link. 	
30.	You have completed the topic "Delegating Job Offer and Opening Approvals". <b>End of Procedure.</b>	

## Accepting or Rejecting Delegation Authorities

### Accepting or Rejecting Delegation Authorities

This topic demonstrates the process of accepting or rejecting a delegation request. A delegation is the act of giving one's authority to another user.



My Delegated Authorities

AMY BOSLEY  
Administrative Clerk I

This page allows you to view your delegated authorities. Select a particular status and select *Refresh* to show the matching requests. Select the information icon for request details.

Show Requests by Status: Submitted Refresh



Choose Delegate							
Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
<input type="checkbox"/> Multiple Transactions	EDWARD MALLOY	Judge - District Court	09/14/2015	09/21/2015	Submitted	Inactive	<a href="#">i</a>

Select All Deselect All Accept Reject

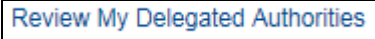
[Return to Manage Delegation](#)

## Procedure

In this topic, an Administrative Official accepts the responsibility for Job Offers and Job Openings approvals.

Step	Action	Notes
1.	Click in the <b>User ID</b> field.	
2.	Enter " <b>amy.bosley</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field.	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	

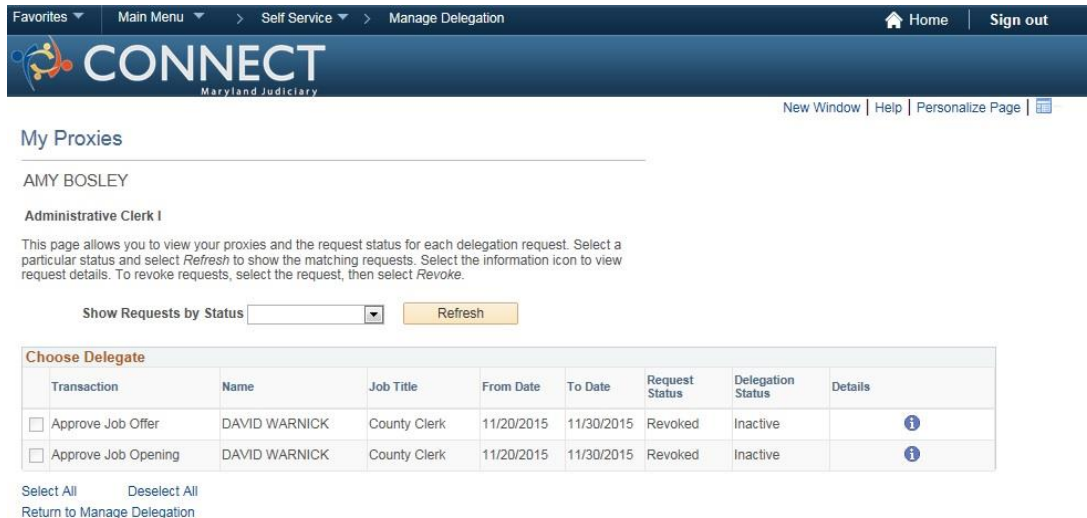


Step	Action	Notes
7.	Click the <b>Self Service</b> menu. 	
8.	Click the <b>Manage Delegation</b> menu. 	
9.	Click the <b>Review My Delegated Authorities</b> link. 	
10.	Click the <b>Multiple Transactions</b> link. 	
11.	The Multiple Transactions page will appear. Review to find out which transactions are being delegated and who is delegating them to you.	
12.	Click the <b>Return</b> button. 	
13.	Click the <b>Multiple Transactions</b> option. 	
14.	Here, you can either Accept or Reject the delegated authority. In this example we will Accept.	
15.	Click the <b>Accept</b> button. 	
16.	Click the <b>OK</b> button. 	
17.	Click the <b>Home</b> link. 	
18.	Click the <b>Sign out</b> link. 	
19.	You have completed the topic "Accepting or Rejecting Delegation Authorities". <b>End of Procedure.</b>	

## Reviewing Delegation Proxies

### Reviewing Delegation Proxies

This topic demonstrates the process for reviewing your proxies. In Connect, you are able to view their name, job title, and delegation period and delegation authority.



My Proxies

AMY BOSLEY

Administrative Clerk I

This page allows you to view your proxies and the request status for each delegation request. Select a particular status and select *Refresh* to show the matching requests. Select the information icon to view request details. To revoke requests, select the request, then select *Revoke*.


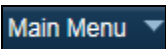
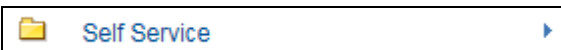
Show Requests by Status ▼ Refresh





Choose Delegate							
Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
<input type="checkbox"/> Approve Job Offer	DAVID WARNICK	County Clerk	11/20/2015	11/30/2015	Revoked	Inactive	
<input type="checkbox"/> Approve Job Opening	DAVID WARNICK	County Clerk	11/20/2015	11/30/2015	Revoked	Inactive	

[Select All](#) [Deselect All](#)  
[Return to Manage Delegation](#)

## Procedure

In this topic, an Administrative Official reviews the delegated responsibility for Job Offers and Job Openings Approvals.

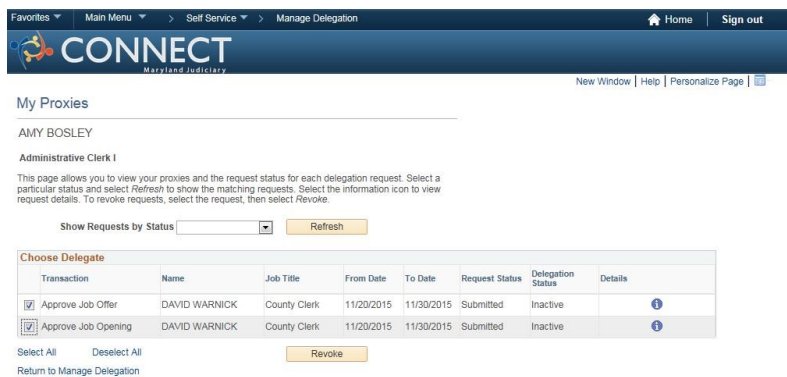
Step	Action	Notes
1.	Click in the <b>User ID</b> field.	
2.	Enter " <b>amy.bosley</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field.	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Self Service</b> menu. 	

Step	Action	Notes
8.	Click the <b>Manage Delegation</b> menu. 	
9.	Click the <b>Review My Proxies</b> link. 	
10.	The "My Proxies" page allows the user to review their proxies.	
11.	Click the <b>Home</b> link. 	
12.	Click the <b>Sign out</b> link. 	
13.	You have completed the topic "Reviewing Delegation Proxies". <b>End of Procedure.</b>	

## Revoking Delegation Proxies

### Revoking Delegation Proxies

This topic will demonstrate the process for a delegator withdrawing delegated authority. When a person is granted authority to act on behalf of another user, that person is deemed a proxy.





My Proxies

AMY BOSLEY

Administrative Clerk I

This page allows you to view your proxies and the request status for each delegation request. Select a particular status and select Refresh to show the matching requests. Select the information icon to view request details. To revoke requests, select the request, then select Revoke.

Show Requests by Status:  Refresh





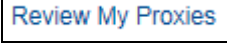


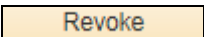

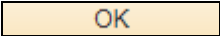
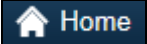

Transaction	Name	Job Title	From Date	To Date	Request Status	Delegation Status	Details
<input checked="" type="checkbox"/> Approve Job Offer	DAVID WARNICK	County Clerk	11/20/2015	11/30/2015	Submitted	Inactive	
<input checked="" type="checkbox"/> Approve Job Opening	DAVID WARNICK	County Clerk	11/20/2015	11/30/2015	Submitted	Inactive	

Select All Deselect All Revoke

Return to Manage Delegation

## Procedure

In this topic, an Administrative Official revokes the responsibility for Job Offers and Job Openings Approvals.

Step	Action	Notes
1.	Click in the <b>User ID</b> field.	
2.	Enter " <b>amy.bosley</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field.	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Self Service</b> menu. 	
8.	Click the <b>Manage Delegation</b> menu. 	
9.	Click the <b>Review My Proxies</b> link. 	
10.	All proxies are listed in the "My Proxies" page. You now have the opportunity to select the delegation requests that you wish to revoke.	
11.	Click the <b>Approve Job Offer</b> option. 	
12.	Click the <b>Approve Job Opening</b> option. 	
13.	Click the <b>Revoke</b> button. 	
14.	Click the <b>Yes - Continue</b> button. 	
15.	Click the <b>OK</b> button. 	
16.	Click the <b>Home</b> link. 	
17.	Click the <b>Sign out</b> link. 	
18.	You have completed the topic "Revoking Delegation Proxies". <b>End of Procedure.</b>	

## Create and Update Performance Documents

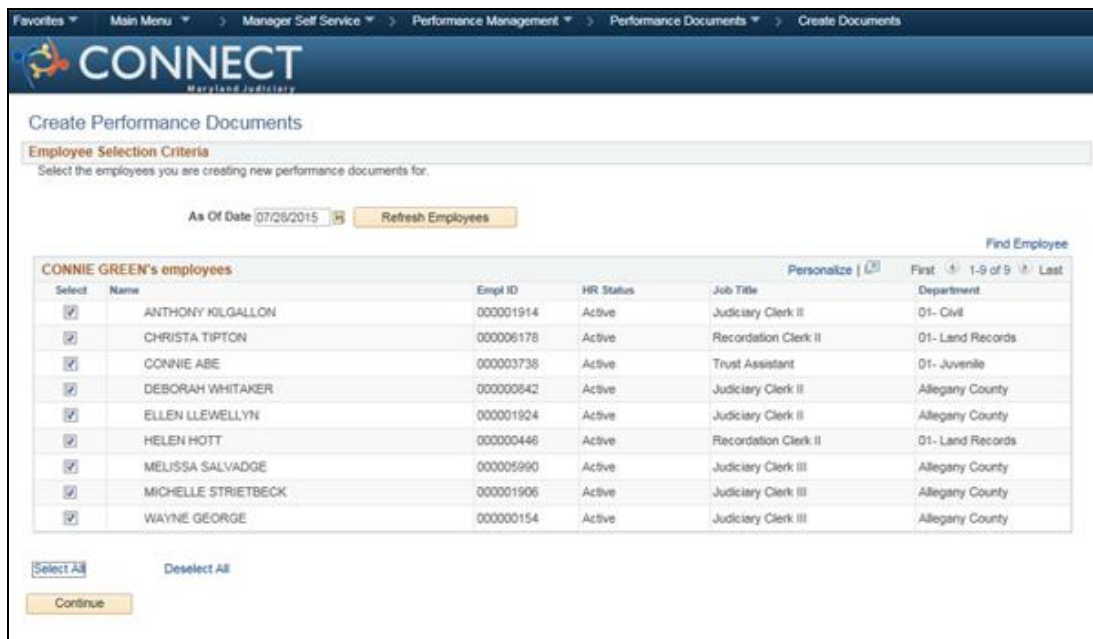
### Create and Update Performance Documents

During this module you will review topics on:

- Create Annual Performance Document (APA)
- Review and Update APA Documents
- Creating a Performance Improvement Plan Document (PIP)
- Reviewing and Update PIP Documents

### Create Annual Performance Document (APA)

Managers will have the ability to create annual performance documents for their team members in just a few easy steps.



CONNECT  
Maryland Judiciary

Create Performance Documents

Employee Selection Criteria  
Select the employees you are creating new performance documents for.

As Of Date: 07/28/2015 Refresh Employees

Find Employee

CONNIE GREEN's employees

Select	Name	Empl ID	HR Status	Job Title	Department
<input checked="" type="checkbox"/>	ANTHONY KILGALLON	000001914	Active	Judiciary Clerk II	01- Civil
<input checked="" type="checkbox"/>	CHRISTA TIPTON	000006178	Active	Recordation Clerk II	01- Land Records
<input checked="" type="checkbox"/>	CONNIE ABE	000003738	Active	Trust Assistant	01- Juvenile
<input checked="" type="checkbox"/>	DEBORAH WHITAKER	000000642	Active	Judiciary Clerk II	Allegany County
<input checked="" type="checkbox"/>	ELLEN LLEWELLYN	000001924	Active	Judiciary Clerk II	Allegany County
<input checked="" type="checkbox"/>	HELEN HOTT	000000446	Active	Recordation Clerk II	01- Land Records
<input checked="" type="checkbox"/>	MELISSA SALVADGE	000005990	Active	Judiciary Clerk III	Allegany County
<input checked="" type="checkbox"/>	MICHELLE STRIETBECK	000001906	Active	Judiciary Clerk III	Allegany County
<input checked="" type="checkbox"/>	WAYNE GEORGE	000000154	Active	Judiciary Clerk III	Allegany County





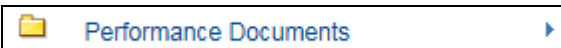



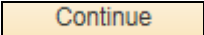


Select All Deselect All




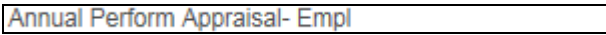
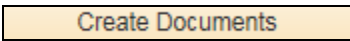

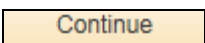



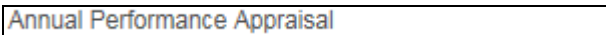

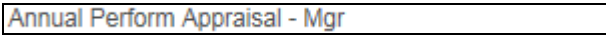
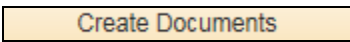

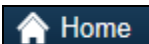
Continue

## Procedure

In this topic you will go through the steps for creating the annual performance document.

Step	Action	Notes
1.	Enter " <b>deborah.kiel</b> " into the <b>User ID</b> field.	
2.	Click in the <b>Password</b> field.	
3.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	

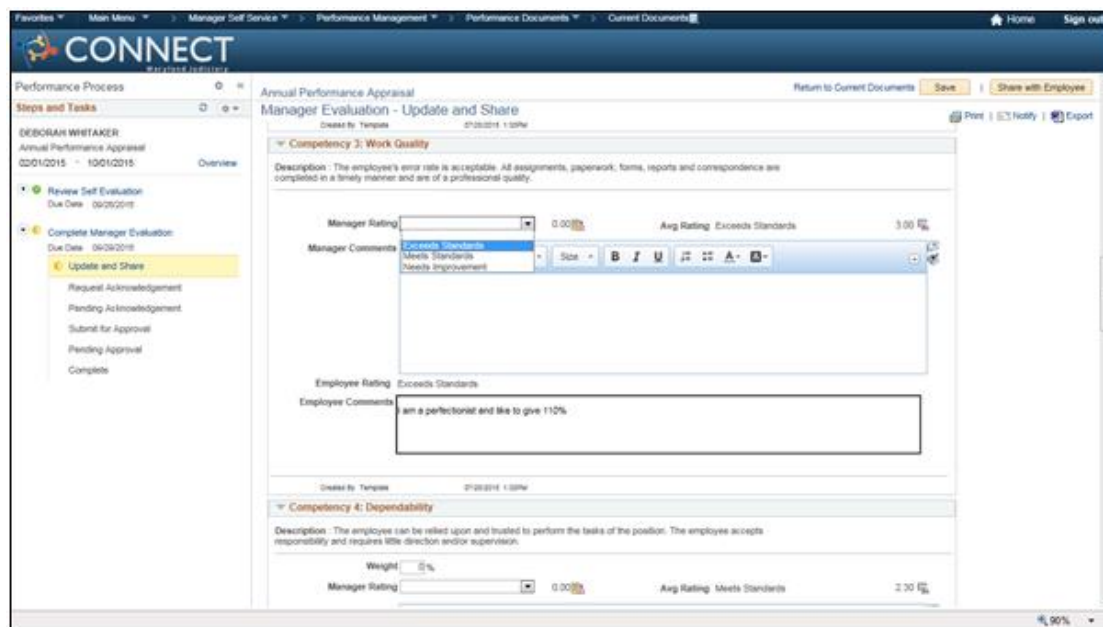
Step	Action	Notes
4.	Click the <b>Sign In</b> button. 	
5.	Click the <b>Main Menu</b> button. 	
6.	Click the <b>Manager Self Service</b> menu. 	
7.	Click the <b>Performance Management</b> menu. 	
8.	Click the <b>Performance Documents</b> menu. 	
9.	Click the <b>Create Documents</b> menu. 	
10.	<b>Note:</b> Managers are rated on 7 competencies and non-manager employees are rated on 5 competencies.  To account for this difference, a separate manager performance document and employee performance document have been created.  When creating the performance documents for your team, you will assign the manager and employee documents accordingly.	
11.	In this example, only 1 of Deborah's team members is a Supervisor. The remaining 6 are non-manager employees.	
12.	Click the <b>Select All</b> link. 	
13.	Click the <b>Select</b> checkbox to deselect Ginger Lockhart. 	
14.	Click the <b>Continue</b> button. 	
15.	Click in the <b>Period Begin Date</b> field. 	
16.	Enter "01/01/2016" into the <b>Period Begin Date</b> field.	
17.	Click in the <b>Period End Date</b> field. 	
18.	Enter "12/31/2016" into the <b>Period End Date</b> field.	

Step	Action	Notes
19.	Click the <b>Document Type</b> drop-down list. 	
20.	Click the <b>Annual Performance Appraisal</b> list item. 	
21.	Click the <b>Template</b> drop-down list. 	
22.	Click the <b>Annual Perform Appraisal- Empl</b> list item. 	
23.	Click the <b>Create Documents</b> button. 	
24.	Click the <b>Create Documents</b> link. 	
25.	Click the <b>Select</b> checkbox for Ginger Lockhart. 	
26.	Click the <b>Continue</b> button. 	
27.	Click in the <b>Period Begin Date</b> field. 	
28.	Enter " <b>01/01/2016</b> " into the <b>Period Begin Date</b> field.	
29.	Click in the <b>Period End Date</b> field. 	
30.	Enter " <b>12/31/2016</b> " into the <b>Period End Date</b> field.	
31.	Click the <b>Document Type</b> drop-down list. 	
32.	Click the <b>Annual Performance Appraisal</b> list item. 	
33.	Click the <b>Template</b> drop-down list. 	
34.	Click the <b>Annual Perform Appraisal - Mgr</b> list item. 	
35.	Click the <b>Create Documents</b> button. 	
36.	Click the <b>Current Documents</b> link. 	
37.	Click the <b>Home</b> link. 	

Step	Action	Notes
38.	Click the <b>Sign out</b> link. <b>Sign out</b>	
39.	You have completed the steps for creating the annual performance document. <b>End of Procedure.</b>	

## Review and Update APA Documents

Managers will be able to update and share the performance document with employees.





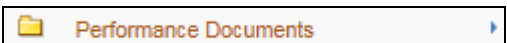


















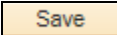
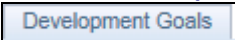

## Procedure








In this topic you will go through the steps for reviewing and updating the annual performance appraisal document.

Step	Action	Notes
1.	Click in the <b>User ID</b> field. <input type="text"/>	
2.	Enter " <b>connie.green</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field. <input type="password"/>	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	



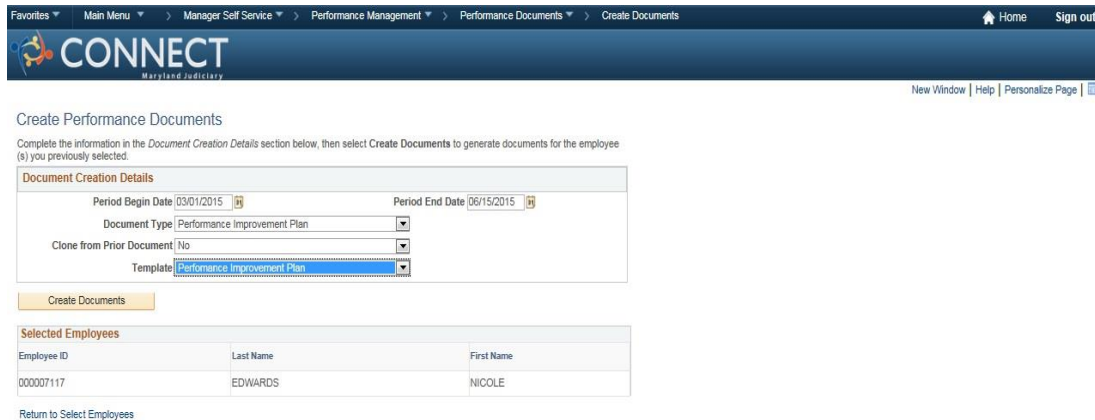
Step	Action	Notes
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Manager Self Service</b> menu. 	
8.	Click the <b>Performance Management</b> menu. 	
9.	Click the <b>Performance Documents</b> menu. 	
10.	Click the <b>Current Documents</b> menu. 	
11.	Click the <b>DEBORAH WHITAKER</b> link. 	
12.	Click the <b>Vertical Scrollbar</b> to scroll down the page.	
13.	Click the <b>Expand</b> link. 	
14.	Click the <b>Manager Rating</b> list. 	
15.	Click the <b>Meets Standards</b> list item. 	
16.	Click the <b>Vertical Scrollbar</b> to scroll down the page.	
17.	Click the <b>Manager Rating</b> list. 	
18.	Click the <b>Meets Standards</b> list item. 	
19.	Click the <b>Vertical Scrollbar</b> to scroll down the page.	
20.	Click the <b>Manager Rating</b> list. 	
21.	Click the <b>Exceeds Standards</b> list item. 	
22.	Click the <b>Vertical Scrollbar</b> to scroll down the page.	

Step	Action	Notes
23.	Click the <b>Manager Rating</b> list. 	
24.	Click the <b>Exceeds Standards</b> list item. 	
25.	Click the <b>Vertical Scrollbar</b> to scroll down the page.	
26.	Click the <b>Manager Rating</b> list. 	
27.	Click the <b>Exceeds Standards</b> list item. 	
28.	Click the <b>Vertical Scrollbar</b> to scroll down the page.	
29.	Click the <b>Manager Rating</b> list. 	
30.	Click the <b>Meets Standards</b> list item. 	
31.	Click in the <b>Manager Comments</b> field.	
32.	Enter " <b>Needs to learn new management techniques that will help improve.</b> " into the <b>Manager Comments</b> field.	
33.	Click the <b>Vertical Scrollbar</b> to scroll down the page.	
34.	Click the <b>Manager Rating</b> list. 	
35.	Click the <b>Exceeds Standards</b> list item. 	
36.	Click the <b>Vertical Scrollbar</b> to scroll down the page.	
37.	Click the <b>Calculate Rating</b> button. 	
38.	Click in the <b>Manager Comments</b> field.	
39.	Enter " <b>Great work and management! New techniques will take you over the top.</b> " into the <b>Manager Comments</b> field.	
40.	Click the <b>Save</b> button. 	
41.	Click the <b>Vertical Scrollbar</b> to scroll down the page.	
42.	Click the <b>Development Goals</b> tab. 	
43.	Click the <b>Expand</b> link. 	

Step	Action	Notes
44.	Click the <b>Edit Details</b> button. 	
45.	Click in the <b>Employee Measurement</b> field.	
46.	Enter " <b>Let's start measuring the learning of new management techniques for 2015.</b> " into the <b>Employee Measurement</b> field.	
47.	Click the <b>Update</b> button. 	
48.	Click the <b>Vertical Scrollbar</b> to scroll down the page.	
49.	Click the <b>Overall Summary</b> tab. 	
50.	Notice the Manager Rating.	
51.	Click the <b>Share with Employee</b> button. 	
52.	Click the <b>Confirm</b> button. 	
53.	You have completed the employee's Annual Performance Appraisal.  Click the <b>Home</b> link. 	
54.	Click the <b>Sign out</b> link. 	
55.	You have completed the steps for reviewing and updating the annual performance appraisal document. <b>End of Procedure.</b>	







## Creating a Performance Improvement Plan Document (PIP)

Managers will have the ability to create performance improvement plan documents for their team members.

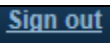


## Procedure

In this topic you will go through the steps of creating a Performance Improvement Plan (PIP) document.

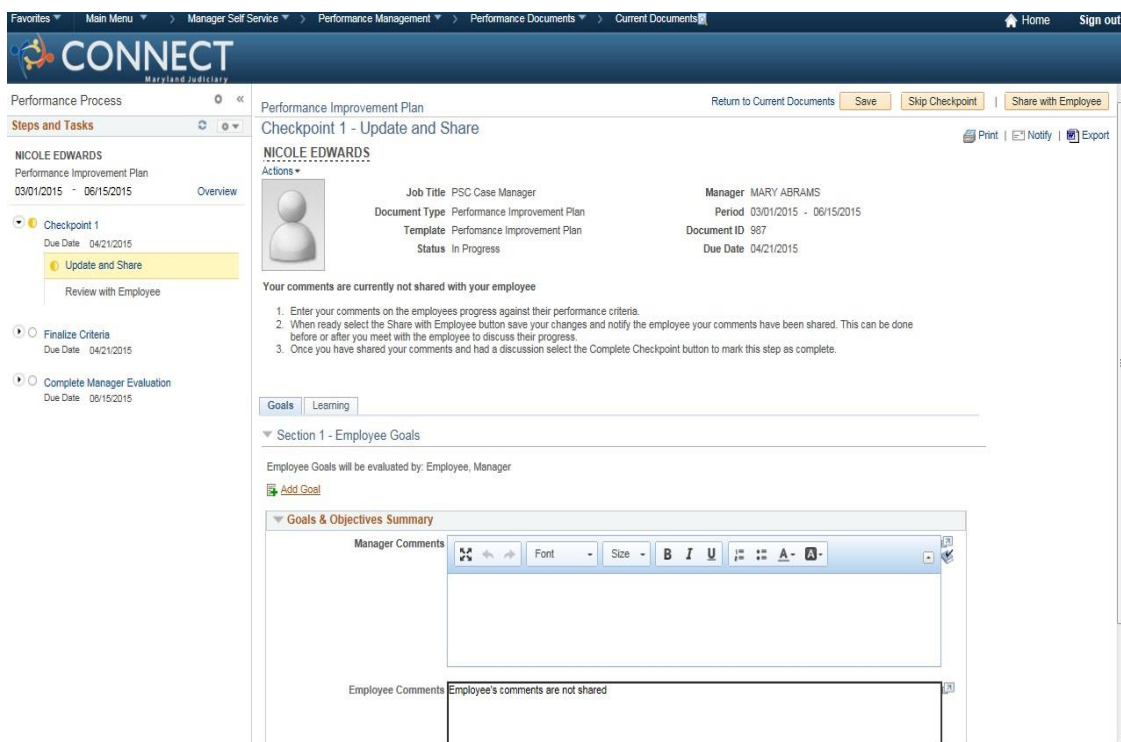
Step	Action	Notes
1.	Click in the <b>User ID</b> field. 	
2.	Enter " <b>mary.abrams</b> " into the <b>User ID</b> field.	
3.	Click in the <b>Password</b> field. 	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Manager Self Service</b> menu. 	
8.	Click the <b>Performance Management</b> menu. 	

Step	Action	Notes
9.	Click the <b>Performance Documents</b> menu. 	
10.	Click the <b>Create Documents</b> menu. 	
11.	Click in the <b>As Of Date</b> field. 	
12.	Press <b>[Backspace]</b> .	
13.	Enter " <b>07/15/2015</b> " into the <b>As Of Date</b> field.	
14.	Click the <b>Refresh Employees</b> button. 	
15.	Click the <b>Vertical</b> scrollbar to navigate down the page.	
16.	Click the check box for <b>NICOLE EDWARDS</b> . 	
17.	Click the <b>Continue</b> button. 	
18.	Click in the <b>Period Begin Date</b> field. 	
19.	Enter " <b>03/01/2015</b> " into the <b>Period Begin Date</b> field.	
20.	Click in the <b>Period End Date</b> field. 	
21.	Enter " <b>06/15/2015</b> " into the <b>Period End Date</b> field.	
22.	Click the <b>Document Type</b> drop-down list. 	
23.	Click the <b>Performance Improvement Plan</b> list item. 	
24.	Click the <b>Template</b> drop-down list. 	
25.	Click the <b>Performance Improvement Plan</b> list item. 	
26.	Click the <b>Create Documents</b> button. 	
27.	This is the Results page. Verify that the document was created successfully by viewing the <b>Status</b> column.	
28.	Click the <b>Home</b> link. 	

Step	Action	Notes
29.	Click the <b>Sign out</b> link. 	
30.	You have completed the steps to creating a Performance Improvement Plan (PIP) document. <b>End of Procedure.</b>	

## Reviewing and Update PIP Documents


Managers will have the ability to review and add development goals to performance improvement plan documents that they have created.






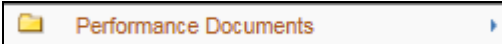
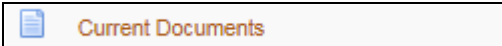
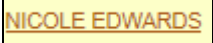

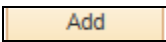


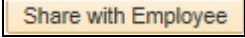



The screenshot shows the 'CONNECTed' Performance Management system interface. The breadcrumb trail indicates the path: Favorites > Main Menu > Manager Self Service > Performance Management > Performance Documents > Current Documents. The user is logged in as Nicole Edwards, and the document is titled 'Performance Improvement Plan - Update and Share'. The document is for Nicole Edwards, a PSC Case Manager, with a due date of 04/21/2015. The document is currently in progress. The interface includes a 'Steps and Tasks' sidebar with options like 'Checkpoint 1', 'Finalize Criteria', and 'Complete Manager Evaluation'. The main content area shows a 'Goals & Objectives Summary' section with a text editor for 'Manager Comments' and a section for 'Employee Comments'.

## Procedure

In this topic you will go through the steps to review and update a PIP document with a development goal.

Step	Action	Notes
1.	Click in the <b>User ID</b> field. 	
2.	Enter " <b>mary.abrams</b> " into the <b>User ID</b> field.	

Step	Action	Notes
3.	Click in the <b>Password</b> field. 	
4.	Enter " <b>welcome1</b> " into the <b>Password</b> field.	
5.	Click the <b>Sign In</b> button. 	
6.	Click the <b>Main Menu</b> button. 	
7.	Click the <b>Manager Self Service</b> menu. 	
8.	Click the <b>Performance Management</b> menu. 	
9.	Click the <b>Performance Documents</b> menu. 	
10.	Click the <b>Current Documents</b> menu. 	
11.	The Current Performance Documents page lists all the performance documents for employees for which you are manager. The page lists the employee, the status of the document, and the dates associated with the document.	
12.	Click the <b>NICOLE EDWARDS</b> link. 	
13.	Click the <b>Add Goal</b> link. 	
14.	Click in the <b>Title</b> field.	
15.	Enter " <b>IT Skills</b> " into the <b>Title</b> field.	
16.	Click in the <b>Description</b> field.	
17.	Enter " <b>Develop SQL skills</b> " into the <b>Description</b> field.	
18.	Click the <b>Add</b> button. 	
19.	Click the <b>Vertical</b> scrollbar to navigate down the page.	
20.	Click in the <b>Manager Comments</b> field.	
21.	Enter " <b>SQL will be reviewed</b> " into the <b>Manager Comments</b> field.	
22.	Click the <b>Vertical</b> scrollbar to navigate down the page.	

Step	Action	Notes
23.	Click in the <b>Manager Comments</b> field.	
24.	Enter " <b>SQL will be reviewed</b> " into the <b>SQL</b> field.	
25.	Click the <b>Share with Employee</b> button. 	
26.	Click the <b>Confirm</b> button. 	
27.	Notice the green check mark that indicates the comments were shared successfully with the employee.	
28.	Click the <b>Home</b> link. 	
29.	Click the <b>Sign out</b> link. 	
30.	You have completed the steps to review and update a PIP document with a development goal. <b>End of Procedure.</b>	



## GLOSSARY

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<b>activity</b>	In the CONNECT Education and Learning system, <b>activity</b> is an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and wait listing capacities.
<b>check box</b>	A <b>check box</b> is a small square box that turns an option on or off.
<b>pagelet</b>	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
<b>search</b>	<b>Search</b> is composed of <u>basic</u> and <u>advance</u> search. Both allow you to look up data based on information provided such as Employee ID or Name, or selecting options from drop-down list boxes.
<b>Sign in</b>	To <b>Sign in</b> or <b>Log in</b> indicates when the site opens, you type in your <b>User ID</b> and <b>Password</b> to access the secured areas.
<b>worklist</b>	The automated to-do list that CONNECT Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

[illegible]

## NOTES

[illegible]

## This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.